

## CLAIMS

- 1           1. A computer-implemented method for creating reports from financial data in a  
2 financial software application, the method comprising:  
3           receiving a selection of a template to be used to create a report, the template  
4           including layout information and content field information;  
5           receiving financial data from a data source; and  
6           applying the received layout information and received content field information  
7           to the received financial data to generate a report, the report having a layout  
8           specified by the layout information, and including content associated with  
9           the content field information.
- 1           2. The method of claim 1 further comprising outputting the report to an output  
2           device.
- 1           3. The method of claim 2 wherein the output device is a computer monitor.
- 1           4. The method of claim 2 wherein the output device is a printer.
- 1           5. The method of claim 2 wherein the output device is storage medium.
- 1           6. The method of claim 1 wherein the data source is a storage device.
- 1           7. The method of claim 1 wherein the selected template is selected using the  
2           Internet.
- 1           8. The method of claim 7 further comprising storing the selected template  
2           locally.

1           9. The method of claim 1, wherein the selected template includes version  
2           information, and prior to applying the received layout information and  
3           received content field information to the received financial data, the template  
4           version is compared to a version associated with the received financial data  
5           to determine whether the financial data is compatible with the selected  
6           template.

1           10. The method of claim 9 further comprising:  
2           responsive to a determination that the financial data is compatible with the  
3           selected template, generating the report.

1           11. A computer-implemented method for creating reports from financial data in  
2           a financial software application, the method comprising:  
3           receiving a report, the report having a layout and content, the content associated  
4           with at least one content field;  
5           determining a structure of the report, the structure including the layout of the  
6           report and each content field of the report; and  
7           storing the structure as a template.

1           12. The method of claim 11 further comprising:  
2           prior to storing the structure as a template, determining whether a user of the  
3           financial software application has permission to store the structure as a  
4           template.

1           13. The method of claim 12 further comprising storing the structure as a  
2           template responsive to the user having permission.

1       14. The method of claim 11, further comprising:  
2       prior to storing the structure as a template, determining that at least one content  
3       field of the report is a unique content field; and  
4       responsive to the at least one content field being a unique content field, not  
5       storing the structure as a template.

1       15. A system for creating reports from financial data in a financial software  
2       application, the system comprising:  
3       a template data store for storing report templates, the report templates including  
4       layout information and content field information used to generate a report;  
5       a user data store for storing user financial data; and  
6       a report engine , communicatively coupled to the template data store and the  
7       user data store, for receiving template data from the template data store and user data  
8       from the user data store, and for generating reports by applying the template data to the  
9       user data.

1       16. A computer program product for creating reports from financial data in a  
2       financial software application, the computer program product stored on a computer-  
3       readable medium and containing instructions configured to cause a processor to execute  
4       the steps of:  
5       receiving a selection of a template to be used to create a report, the template  
6       including layout information and content field information;  
7       receiving financial data from a data source; and  
8       applying the received layout information and received content field information  
9       to the received financial data to generate a report, the report having a layout

10 specified by the layout information, and including content associated with  
11 the content field information.

1 17. A computer program product for creating reports from financial data in a  
2 financial software application, the computer program product stored on a computer-  
3 readable medium and containing instructions configured to cause a processor to execute  
4 the steps of:

5 receiving a report, the report having a layout and content, the content associated  
6 with at least one content field;  
7 determining a structure of the report, the structure including the layout of the  
8 report and each content field of the report; and  
9 storing the structure as a template.

1 18. A system for creating reports from financial data in a financial software  
2 application, the system comprising:  
3 first receiving means for receiving a selection of a template to be used to create a  
4 report, the template including layout information and content field  
5 information;  
6 second receiving means for receiving financial data from a data source; and  
7 applying means, coupled to the first receiving means and the second receiving  
8 means, for applying the received layout information and received content  
9 field information to the received financial data to generate a report, the report  
10 having a layout specified by the layout information, and including content  
11 associated with the content field information.

1           19. A system for creating reports from financial data in a financial software  
2 application, the system comprising:  
3           receiving means for receiving a report, the report having a layout and content,  
4           the content associated with at least one content field;  
5           determining means, coupled to the receiving means, for determining a structure  
6           of the report, the structure including the layout of the report and each content  
7           field of the report; and  
8           storing means, coupled to the determining means, for storing the structure as a  
9 template.